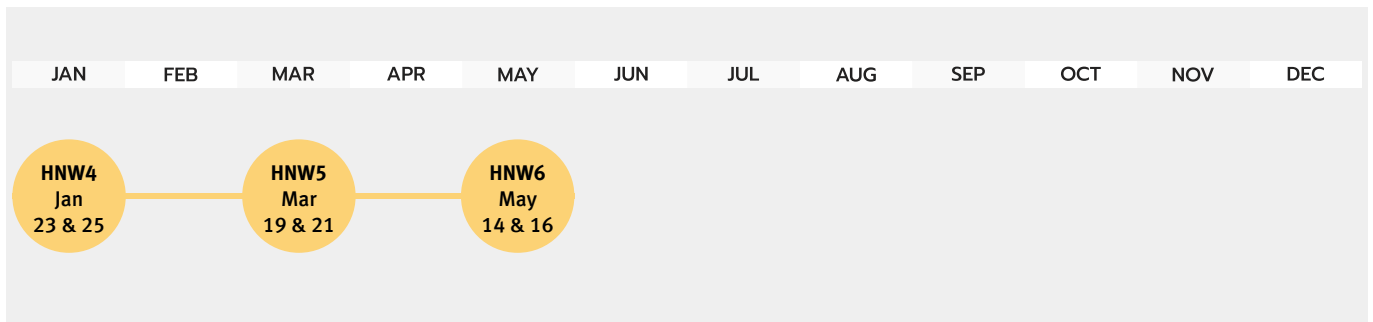


# High Net Worth Certification Programme

## Cohort 3, 2023 – Students who started in August 2023



\*Workshop attendance dates shown above, is the duration of a nominated cohort journey in sequential subject order for completion in less than 12 months.

### Subject 4: Insurance Solutions and Asset Protection for High Net Worth Individuals

January 2024	
Online access to subject material	Monday, 15 January
Face to Face Workshop 1	Tuesday, 23 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 25 January @ 1:00pm – 5:30pm
Assignment due	Thursday, 1 February

### Subject 5: Private Wealth Investment Strategies and Portfolio Construction

March 2024	
Online access to subject material	Monday, 11 March
Face to Face Workshop 1	Tuesday, 19 March @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 21 March @ 1:00pm – 5:30pm
Exam	Thursday, 28 March

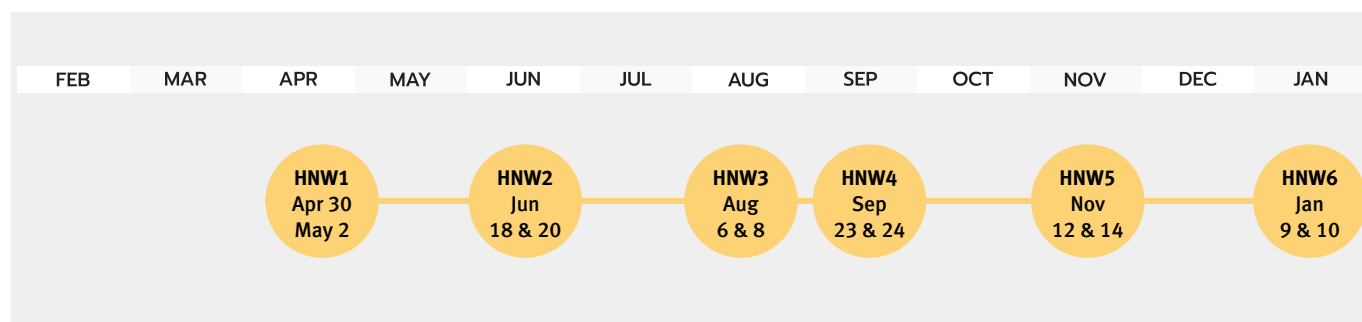
# High Net Worth Certification Programme

## *Subject 6: Applied Business Strategy for HNWIs and Family Offices*

<b>May 2024</b>	
Online access to subject material	Monday, 6 May
Face to Face Workshop 1	Tuesday, 14 May @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 16 May @ 1:00pm – 5:30pm
Assignment due	Friday, 23 May

## High Net Worth Certification Programme

### Cohort 3, 2024 – New students starting in 2024



\*Workshop attendance dates shown above, is the duration of a nominated cohort journey in sequential subject order for completion in less than 12 months.

#### Subject 1: Private Wealth and Family Office: Environment, Trends and Client Focus

April 2024	
Online access to subject material	Monday, 22 April
Face to Face Workshop 1	Tuesday, 30 April @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 2 May @ 1:00pm – 5:30pm
Assignment due	Thursday, 9 May

#### Subject 2: Business Structuring and Tax Considerations (including Beyond Borders Advice)

June 2024	
Online access to subject material	Monday, 10 June
Face to Face Workshop 1	Tuesday, 18 June @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 20 June @ 1:00pm – 5:30pm
Assignment due	Thursday, 27 June

## High Net Worth Certification Programme

### *Subject 3: Estate Planning Strategies for High Net Worth Individuals and Family Offices*

<b>August 2024</b>	
Online access to subject material	Monday, 29 July
Face to Face Workshop 1	Tuesday, 6 August @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 8 August @ 1:00pm – 5:30pm
Assignment due	Thursday, 15 August

### *Subject 4: Insurance Solutions and Asset Protection for High Net Worth Individuals*

<b>September 2024</b>	
Online access to subject material	Monday, 16 September
Face to Face Workshop 1	Monday, 23 September @ 1:00pm – 5:30pm
Face to Face Workshop 2	Tuesday, 24 September @ 1:00pm – 5:30pm
Assignment due	Thursday, 3 October

### *Subject 5: Private Wealth Investment Strategies and Portfolio Construction*

<b>November 2024</b>	
Online access to subject material	Monday, 4 November
Face to Face Workshop 1	Tuesday, 12 November @ 1:00pm – 5:30pm
Face to Face Workshop 2	Thursday, 14 November @ 1:00pm – 5:30pm
Exam	Friday, 22 November

# High Net Worth Certification Programme

## *Subject 6: Applied Business Strategy for HNWI's and Family Offices*

<b>January 2025</b>	
Online access to subject material	Monday, 30 December
Face to Face Workshop 1	Thursday, 9 January @ 1:00pm – 5:30pm
Face to Face Workshop 2	Friday, 10 January @ 1:00pm – 5:30pm
Assignment due	Friday, 17 January